ULTRACART

UltraCart Extension for Zoho CRM

User Manual

Version 1.0

Prepared By:

TIARA

IT Solution Provider
www.tiaraconsulting.com

TABLE OF CONTENTS

UltraCart– Zoho CRM Extension: User Manual

1. Overview

UltraCart is shopping cart software used to sell the products online. **UltraCart Extension for Zoho CRM** is a Zoho CRM Extension developed by Tiara, a Zoho Alliance Partner, and available in Zoho Marketplace for all Zoho users to deploy as an extension for Zoho CRM.

Using this extension, Zoho CRM users can sync the Customers, Products and Orders modules from UltraCart unidirectionally to Zoho CRM account. The Customers module from UltraCart will be synced to Contacts module of Zoho CRM, Products will be synced to Products and Orders from UltraCart will be synced to Invoices module of Zoho CRM. Any update/deletion of the records from the respective modules of the UltraCart account will be reflected on the respective modules of Zoho CRM account.

This User Manual document provides step-by-step instructions to install this extension from Zoho Marketplace, how to configure and use the integration functionality within your Zoho CRM account.
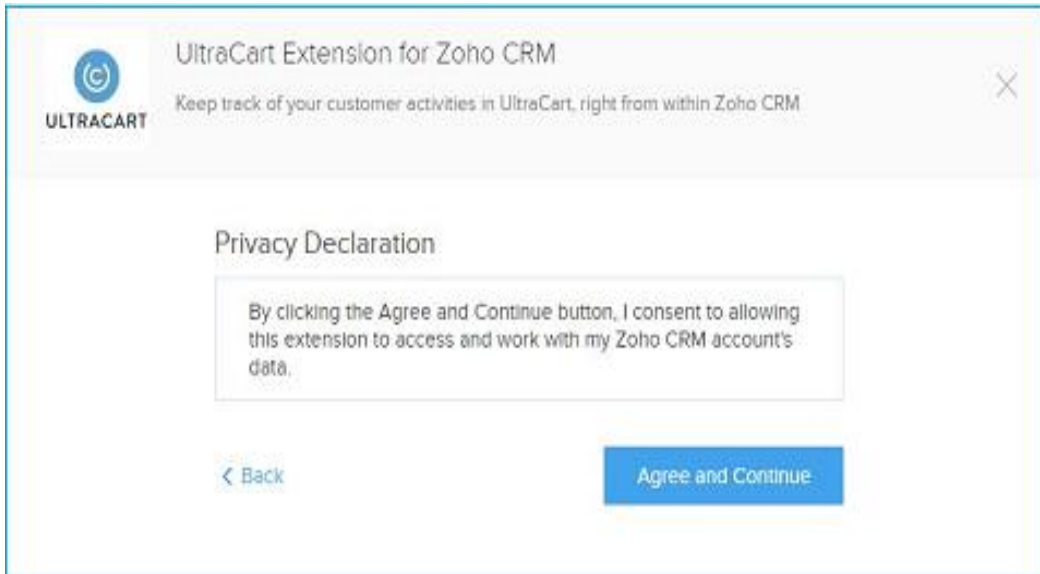
1.1. Install the UltraCart Extension

Go to Zoho Marketplace and search for "**UltraCart**" to locate the extension and install directly from the Marketplace. Alternatively, you can install the UltraCart extension by logging in to your Zoho CRM account and follow the below installation instructions.

**To install the UltraCart Extension from Zoho CRM**:

❖ Go to **Setup** > **Marketplace** > **All**. By default, all the Zoho Extensions currently installed within your Zoho CRM account are listed. Go to "**All Extensions" tab** to view all available Extensions.
❖ Click **All Extensions,** browse/search for *UltraCart*, locate (see screenshot below) and then click the Extension. The details about the Extension will be shown as per screenshot below.
❖ Click **Install** button**.**
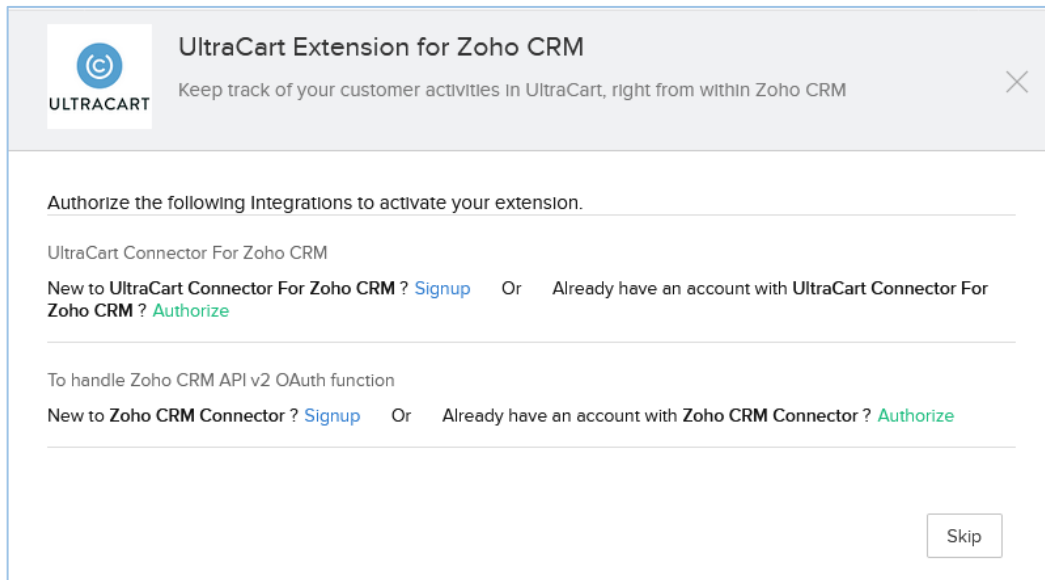❖ Make sure you check the "Agree to the *Terms of Service"* *checkbox* and click **Install**.
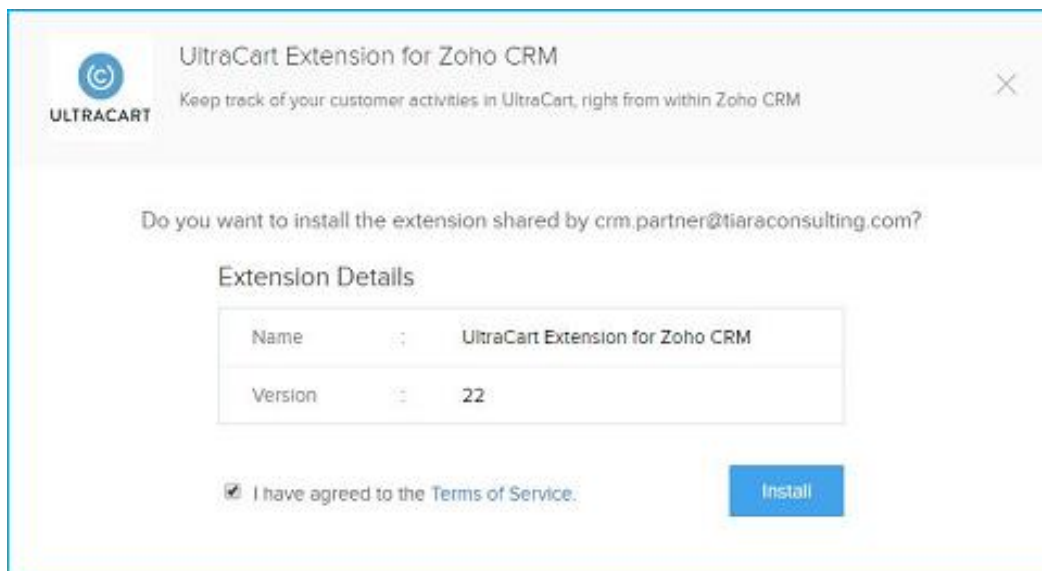
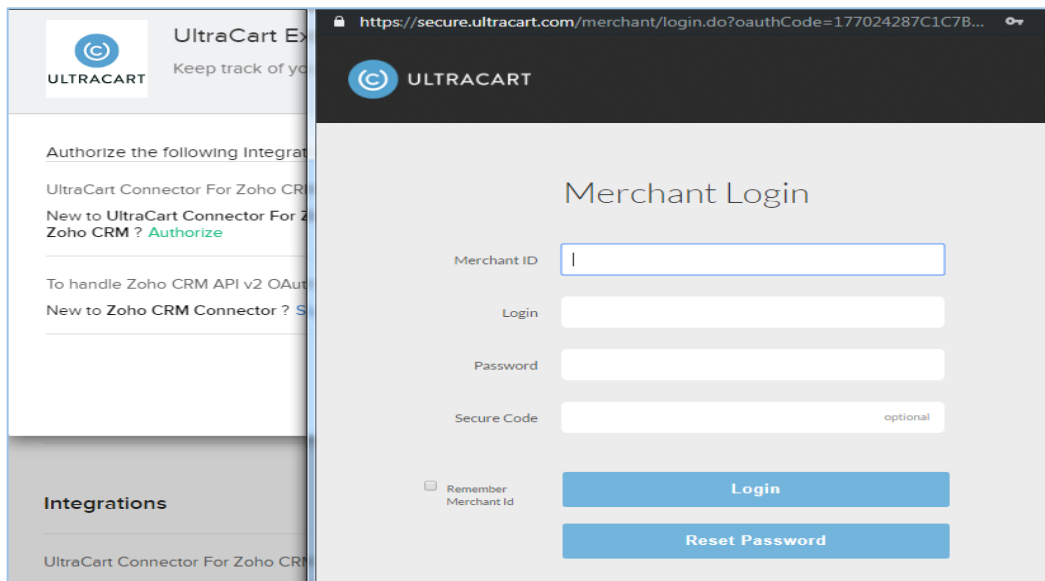❖ Read the Privacy Declaration and click **Agree and Continue.**

❖ Select the users/profiles for which the extension needs to be installed and click "**Confirm**".
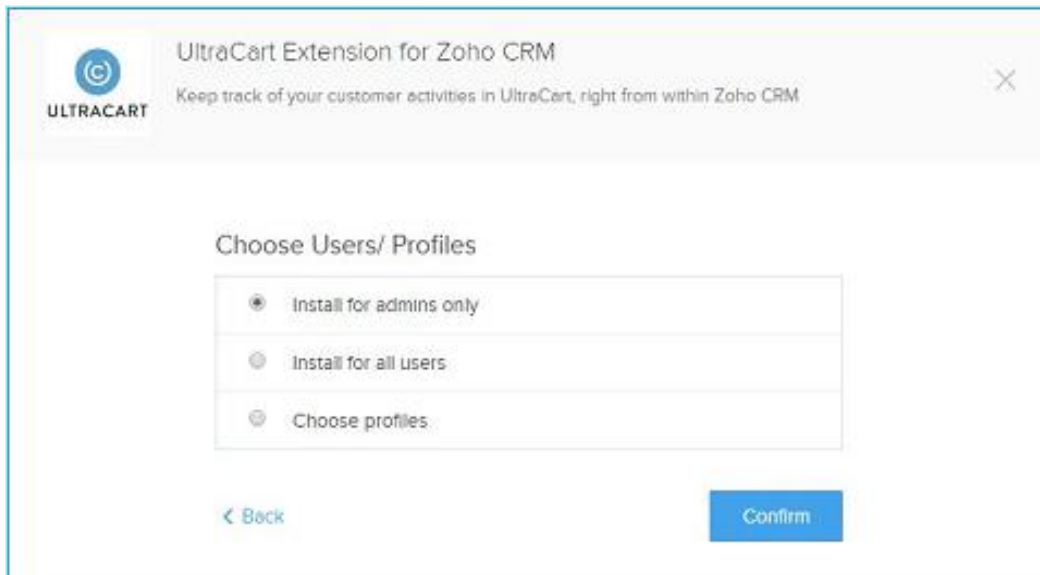
❖ In the pop-up, click **Authorize**.
   If you skip this step, you can authorize the extension later from the **UltraCart Extension Details** page.

❖ Specify the login credentials of your UltraCart account and click **Login**.

❖ After login, UltraCart will request to provide permission to access the data from UltraCart to Zoho CRM account.
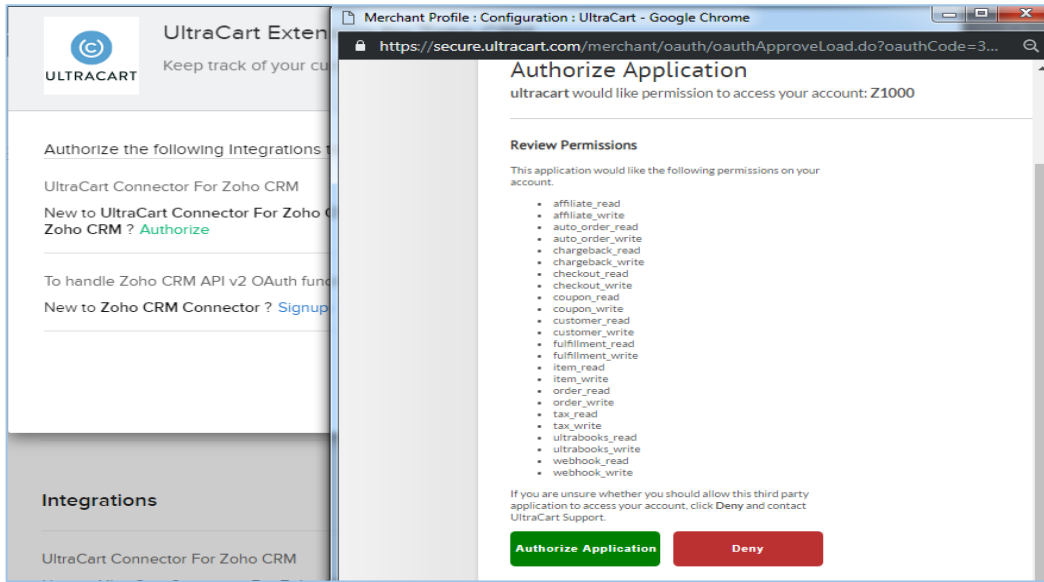
❖ After authorizing your UltraCart account, please authorize your Zoho CRM account.
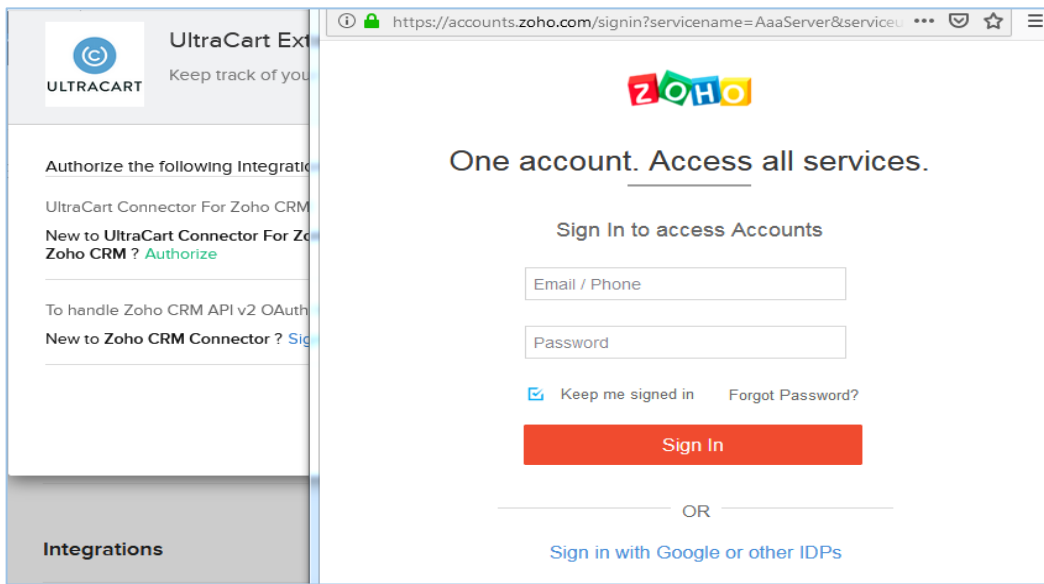
1.2. Uninstall the UltraCart Extension for Zoho CRM

Uninstalling this extension from Zoho CRM will delete all its associated data.

To uninstall UltraCart Extension, please follow the below steps:

❖ Go to **Setup** > **Marketplace** > **All > Installed tab**.
All the installed Extensions will be listed.
❖ Browse for *UltraCart* and click on **Uninstall** link.
❖ Click **Okay** to confirm in the confirmation pop-up that follows. The Extension will be uninstalled.

2. Synchronization

Once the UltraCart Extension is authorized from Zoho CRM account, all the UltraCart account data (Customers, Products and Orders) will sync to the Zoho CRM account. The data will be synced unidirectionally (UltraCart –> Zoho CRM).

Any changes (edit/update/delete) from the modules (Customer, Products and Orders) of UltraCart will be reflected instantaneously (real time sync) in the respective modules of Zoho CRM account.

2.1. Contacts

In Contacts module, the following custom fields are created after the successful installation of UltraCart Extension. Below are the details of the custom fields created by the extension within **Contacts** module.

- ❖ **Customer UID:** Text Field
- ❖ **Integrated From UltraCart:** Checkbox

The unique ID for the customer from the UltraCart account will be mapped to the custom field '**Customer UID**'. The custom checkbox '**Integrated from UltraCart**' will be checked for the records that gets synced from the UltraCart account.

2.2. Products

In Products module, the following custom fields are created after the successful installation of UltraCart Extension. Below are the details of the custom fields created by the extension within **Products** module.

- ❖ **Product OID: Text Field**
- ❖ **Integrated From UltraCart:** Checkbox

The unique ID for the customer from the UltraCart account will be mapped to the custom field 'Products OID'. The custom checkbox 'Integrated from UltraCart' will be checked for the records that gets synced from the UltraCart account.

2.3. Invoices

In Invoices module, the following custom fields are created after the successful installation of UltraCart Extension. Below are the details of the custom fields created by the extension within **Invoices** module.

- ❖ **Integrated From UltraCart:** Checkbox
- ❖ **UltraCart Status:** Drop Down

The unique ID for the customer from the UltraCart account will be mapped to the custom field '**Products OID**'. The custom checkbox '**Integrated from UltraCart**' will be checked for the records that gets synced from the UltraCart account. The Order status from the UltraCart account will be updated in the custom dropdown '**UltraCart Status**'.

3. UltraCart Sync History

In UltraCart Sync History module, the following tabs are created after the successful installation of the Extension. **Total Run status** shows the details of total integrated records from UltraCart to Zoho CRM in respective modules. Below are the details of the custom tabs created by the extension within UltraCart sync history module.

- ❖ **Customer**
- ❖ **Invoices**
- ❖ **Products**

If you select the "**Customer**" tab, last 5 synced customer records are shown in the grid with Customer Name, Customer UID, Customer Email and Home Phone details.

If you select the "**Products**" tab, last 5 synced Products records are shown in the grid with Product Name, Unit Price, Product UID and Quantity in Stock details.

If you select the "**Invoices**" tab, last 5 synced Invoices records are shown in the grid with Invoice Date, Invoice Number, Total Amount and UltraCart Invoice Status details.


4. UltraCart Error Log

In UltraCart Error log module, the following custom fields are created after the successful installation of the Extension. Below are the details of the custom fields created by the extension within **UltraCart Error** log module.

- ❖ **UltraCart Error Log Name :** Text Field
- ❖ **Module Name**: Drop Down

❖ **UltraCart ID :** Text Field
❖ **Error Reason :** Text Area

Once the authorization is completed, all UltraCart Contacts, Products and Orders module are integrated into the Zoho CRM. During the integration process, the failed records from all the module will be captured in the UltraCart Error Log window. This has the error reason and the reason for the failure.

Once if the error is resolved, click the "**Sync**" Button to manually sync the particular record.
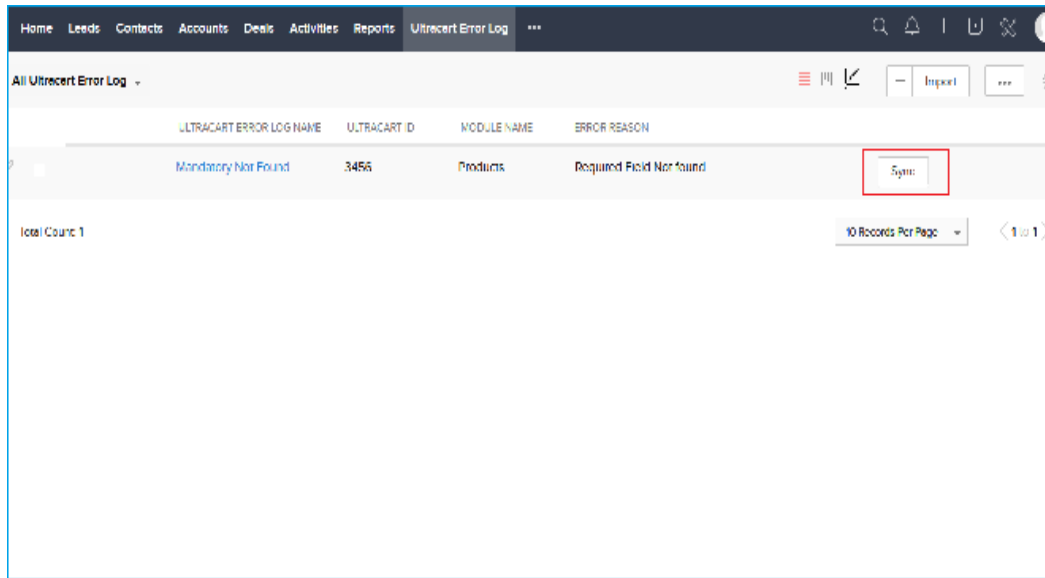
5. Support Contacts for UltraCart Extension – Tiara Help Desk.

Thank you for installing UltraCart extension. If you have any questions or facing installation issues, Please contact Tiara support Desk for Zoho extensions via email at zohosupport@tiaraconsulting.com or call us at **(925) 218 4080.**

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